

What is claimed is:

1. A software implemented method in a computer system for browser-based arbitration in a classification workflow process, the method comprising the steps of:

authenticating a user name and password for enabling a user logon;

5 displaying a task list screen, the task list screen displaying a summary list containing each current task that the user has permission to view and links to a task detail screen, a search form screen, and a search queue screen; and enabling the user to arbitrate an assigned classification of assigned tasks in the workflow process.

10 2. The method of claim 1, further comprising the step of allowing the user to update a class, status and ownership of tasks selected from the summary list of each current task.

3. The method of claim 1, wherein the step of displaying the summary list of each current task includes the steps of:

15 displaying a link to a task details screen;
displaying a means for selecting the record;
displaying a source document identification;
displaying a task owner username;
displaying created time and date;
20 displaying a modified time and data;
displaying a task class;
displaying a task status; and
displaying a justification summary for a classification.

4. The method of claim 1, further comprising the step of linking to the task detail screen for displaying detailed information about the results of a task including the steps of displaying summary information, a task history/log, a summary of rule checks that were applied to a source document, and a summary of queries.

5 5. The method of claim 4 wherein the step of displaying summary information includes the steps of:

displaying a source document identification;

displaying a link to source document details screen;

displaying a task owner username;

10 displaying created time and date;

displaying a modified time and data;

displaying a current task class;

displaying a current task status;

displaying a justification summary for a classification; and

15 displaying means for enabling the user to update the task summary, the classification, and the owner.

6. The method of claim 4, wherein the step of displaying a task/history log includes the steps of:

displaying summary information from each entry in a task history and each note
20 associated with the task;

displaying a button for enabling the user to create a new note;

displaying a date when a history record and each note was created; and

displaying a contents of a description field for a history record and each note.

7. The method of claim 4, wherein the step of displaying a summary of rule checks that were applied to a source document includes the steps of:

- displaying a class for each rule;
- displaying a description of each rule that was applied to the class;
- 5 displaying the target schema that was used in each rule check;
- displaying a highest score from each rule check; and
- displaying a link to a details screen for each rule check.

8. The method of claim 4, wherein the step of displaying a summary of queries includes the steps of:

- 10 displaying a name of a target schema;
- displaying the name of a field mapping that was used to map an input schema to a target schema;
- displaying a highest score returned;
- displaying the number of documents that were returned; and
- 15 displaying a link to a side-by-side screen for displaying details of a query criteria and result.

9. The method of claim 1, further comprising the step of linking to the search form screen for enabling the user to define a query document and execute searches using available search engine schemas, comprising the steps of:

- 20 displaying text fields of a query document that match fields in a target schema for entering query data;
- displaying one or more target schemas and means for selecting one or more target schemas to search against;

providing means for enabling the user to select immediate execution of a search
and displaying a search results summary screen; and
providing means for enabling a user to select a search in background execution by
sending the search criteria to a queue for later execution and displaying the
5 task list screen.

10. The method of claim 9, further comprising the steps of:

displaying two text fields for enabling a user to enter a range of document indexes
for restricting a result set;

displaying a means for selecting specific displayed schemas applicable to

10 restricting a result set to a specific schema index ranges;

displaying two text fields for enabling a user to enter a range of document scores
for restricting a result set; and

displaying a means for selecting specific displayed schemas applicable to
restricting a result set to a specific score range.

15 11. The method of claim 1, further comprising the step of linking to the search queue
screen for displaying status and results of background searches having delayed execution,
comprising the steps of:

displaying a list of all searches queued by the user;

for each queued search, displaying means for selecting the queued search;

20 for each queued search, displaying a time/date that the search was queued and a
time/date that the search was completed; and

for each queued search, displaying target schemas that were searched, a number
of returned result documents, and a current status of the queued searches.

12. The method of claim 11, further comprising for each queued search, the step of displaying a link to a search results summary screen if a search is completed.

13. The method of claim 11, further comprising the step of displaying a means for deleting selected queued searches.

5 14 The method of claim 12, further comprising the step of linking to the search result summary screen for reviewing a result from a specific search, comprising the steps of:

displaying a field name and criteria value for each populated field in an original query document;

displaying summary search results for each returned document in a result set,

10 including means for selecting a one or more result sets, result document identification for linking to a document detail search result screen, and result set score;

displaying a header label indicating a target schema and mapping used to generate a query;

15 displaying means for linking to a side-by-side search result screen and linking to a document detail search result screen; and

displaying means for selecting all documents in a result set and for clearing all documents in a result set.

15. The method of claim 14, further comprising the step of linking to the side-by-side

20 search result screen for enabling the user to view details for multiple documents, comprising the steps of:

displaying query document data including field name, criteria value and score;

displaying side-by-side search results by column for each result set, including a document identification, overall document score, and target schema that contains the document; and

5 displaying a field name for each mapped node in a target schema, a target value for that node, and a score for that node.

16. The method of claim 14, further comprising the step of linking to the document detail search result screen for enabling the user to view results of a single document, comprising the steps of:

10 displaying a document identification, a document's schema name, and a link to open the document in a fraud investigator application; and displaying each field name and field value of the result document.

17. The method of claim 1, further comprising the steps of; enabling the user to attach a note to a task record; and enabling the user to obtain help information online.

15 18. A computer-readable medium containing instructions for controlling a computer system according to the method of claim 1.

19. A user interface method for browser-based arbitration in a classification workflow process, the method comprising:

entering a user name and password for enabling user authentication;
20 viewing a task list screen, the task list screen displaying a summary list containing each current task that the user has permission to view and links to a task detail screen, a search form screen, and a search queue screen; and arbitrating an assigned classification of assigned tasks in the workflow process.

20. The method of claim 19, further comprising updating a class, status and ownership of tasks selected from the summary list of each current task.

21. The method of claim 19, further comprising viewing the summary list of each current task, including:

- 5 viewing a link to a task details screen;
- viewing a means for selecting the record;
- viewing a source document identification;
- viewing a task owner username;
- viewing created time and date;
- 10 viewing a modified time and data;
- viewing a task class;
- viewing a task status; and
- viewing a justification summary for a classification.

22. The method of claim 19, further comprising selecting the task detail screen for

- 15 viewing detailed information about the results of a task including viewing summary information, a task history/log, a summary of rule checks that were applied to a source document, and a summary of queries.

23. The method of claim 22, wherein viewing summary information includes:

- viewing a source document identification;
- 20 viewing a link to source document details screen;
- viewing a task owner username;
- viewing created time and date;
- viewing a modified time and data;

viewing a current task class;
viewing a current task status;
viewing a justification summary for a classification; and
viewing means for enabling the user to update the task summary, the
5 classification, and the owner.

24. The method of claim 22, wherein viewing a task/history log includes:

viewing summary information from each entry in a task history and each note
associated with the task;
viewing a button for enabling the user to create a new note;
10 viewing a date when a history record and each note was created; and
viewing a contents of a description field for a history record and each note.

25. The method of claim 22, wherein viewing a summary of rule checks that were applied
to a source document includes:

viewing a class for each rule;
15 viewing a description of each rule that was applied to the class;
viewing the target schema that was used in each rule check;
viewing a highest score from each rule check; and
viewing a link to a details screen for each rule check.

26. The method of claim 22, wherein viewing a summary of queries includes:

20 viewing a name of a target schema;
viewing the name of a field mapping that was used to map an input schema to a
target schema;
viewing a highest score returned;

viewing the number of documents that were returned; and

viewing a link to a side-by-side screen for displaying details of a query criteria
and result.

27. The method of claim 19, further comprising selecting a link to the search form screen
5 for enabling the user to define a query document and execute searches using available
search engine schemas, comprising:

viewing text fields of a query document that match fields in a target schema for
entering query data;

viewing one or more target schemas and means for selecting one or more target
10 schemas to search against;

selecting immediate execution of a search and viewing a search results summary
screen; and

selecting a search in background execution for sending the search criteria to a
queue for later execution and viewing the task list screen.

15 28. The method of claim 27, further comprising:

entering a range of document indexes into two text fields for restricting a result
set;

selecting specific displayed schemas applicable to restricting a result set to a
specific schema index ranges;

20 entering a range of document scores into two text fields for restricting a result
set; and

selecting specific displayed schemas applicable to restricting a result set to a
specific score range.

29. The method of claim 19, further comprising selecting a link to the search queue screen for viewing status and results of background searches having delayed execution, comprising:

- viewing a list of all searches queued by the user;
- 5 for each queued search, selecting one or more queued searches;
- for each queued search, viewing a time/date that the search was queued and a time/date that the search was completed; and
- for each queued search, viewing target schemas that were searched, a number of returned result documents, and a current status of the queued searches.

10 30. The method of claim 29, further comprising for each queued search, viewing a link to a search results summary screen if a search is completed.

31. The method of claim 29, further comprising viewing a means for deleting selected queued searches.

15 32 The method of claim 29, further comprising selecting the link to the search result summary screen for reviewing a result from a specific search, comprising the steps of:

- viewing a field name and criteria value for each populated field in an original query document;
- viewing summary search results for each returned document in a result set, including selecting a one or more result sets, result document identification for
- 20 linking to a document detail search result screen, and result set score;
- viewing a header label indicating a target schema and mapping used to generate a query;

linking to a side-by-side search result screen and linking to a document detail

search result screen; and

selecting all documents in a result set and for clearing all documents in a result

set.

- 5 33. The method of claim 32, further comprising selecting the link to the side-by-side search result screen for enabling the user to view details fo multiple documents, comprising:

viewing query document data including field name, criteria value and score;

viewing side-by-side search results by column for each result set, including a

- 10 document identification, overall document score, and target schema that contains the document; and

viewing a field name for each mapped node in a target schema, a target value for that node, and a score for that node.

34. The method of claim 32, further comprising selecting the link to the document detail

- 15 search result screen for enabling the user to view results of a single document, comprising:

viewing a document identification, a document's schema name, and a link to open the document in a fraud investigator application; and

viewing each field name and field value of the result document.

- 20 35. The method of claim 19, further comprising the steps of;

attaching a note to a task record; and

obtaining help information online.

36. A computer-readable medium containing instructions for controlling a computer system according to the method of claim 19.

37. A computer system for browser-based arbitration in a classification workflow process, comprising:

- 5 means for displaying workflow classification information;
- means for initiating a search based on selected task information;
- means for receiving task results from a classification engine; and
- means for interactively classifying task results.

38. The system of claim 37, wherein the means for displaying and receiving is a
10 computer display terminal, and the means for initiating and interactively classifying is a computer keyboard and mouse.

39. A method in a computer system for browser-based arbitration in a classification workflow process, comprising:

- a user for entering, selecting, viewing and updating classification task information
15 in the computer system; and
- a computer display terminal, keyboard and mouse, and computer for displaying, enabling, linking, and providing classification task information to the user.